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Chile

Food Service - Hotel Restaurant Institutional

HRI Sector Report

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Report Highlights:

Chileans are now demanding more choice not only in products in supermarkets but also in restaurants and cafés. Rising disposable incomes have stimulated interest in premium, foreign products. In addition, U.S. food products are known for their reliability and high standards, as they meet FDA and USDA standards.

Although Chile produces many local crops and products, they continue to import many of their bulk and

intermediate products. Importers will need to implement Chile's new nutritional labeling law requirements.

Post:
Santiago

Executive Summary:

Section I: Market Summary.

Country Overview.

Chile's economy is market orientated and benefits from its 23 free trade agreements (FTAs). In particular its strong exports which account for around one third of GDP. Chile has fared well in comparison to other countries during a period of economic slowdown, due to its disciplined fiscal policies. This, in addition to Chile's flexible outlook on the economy, reduces its level of vulnerability to external shocks which could be caused by their strong reliance on exports and the openness of its market. Chile has the strongest sovereign bond rating in South America and good credit ratings (see below). This stability contributed to achieving nearly US\$23 billion in foreign direct investment in 2014, an increase of 15% from 2013.

Table 1: Ratings and Rankings of Chile.

Rating/Ranking by	Rating
S&P 2014	AA-
Fitch 2014	A+
Moody's 2014	Aa3
Global Competitiveness Index (2014-2015 out of 144 countries)	33 rd (1 st in Latin America)
Doing Business (2015)	41 st

Chile has one of the lowest inflation rates in South America. However, as of June 2015, annual inflation reached 4.40%; much higher than the 3% which the Central Bank of Chile aims to achieve on a yearly basis. This higher inflation has been caused by higher energy prices, the depreciation of the Chilean peso, and higher external costs compounded with the lower selling price of copper. These factors together have resulted in lower than average real GDP growth; predicted at 2.7% for 2015. However, GDP is forecast to rise to 3.3% in 2016. Currently ranked 41st in the world's Human Development Index, the highest in all of Latin America, Chile is being looked at as the first Latin American country to transfer from a "country in development" to a "developed nation".

Hotel Restaurant Institutional Market Overview.

- It's estimated that around 15% (almost US\$643 million) of the food for the HRI market is currently imported, mainly from the United States, Asia, and other Latin American countries.
- Increasingly hectic lifestyles and less time to eat and cook are driving consumers to spend more on eating away from home. This trend is positively impacting all manufacturers, as consumer food service is growing rapidly. Restaurants in Chile accounted for sales of nearly US\$3.8 billion in 2014, and 31,859 outlets, including chained and independent players.
- At-home retail packaged food consumption in Chile is not affected in a noticeable way by

consumer food service growth, as this phenomenon is related mostly to Chilean consumers eating out for lunch, or social gatherings in the evening. Thus, most other meals, such as breakfast and everyday dinner, are still eaten at home.

- In the past five years, the size of the middle class has expanded, leading to increased expenditure in food service by 5% in 2014, and forecasted future growth to remain at 6.6% until 2018.
- Travel and tourism is expected to rise by 4.4% as favorable exchange rates attract more foreigners, and also boost domestic tourism from prohibitive costs of going abroad. Tourism and business travel are two factors that have greatly affected the HRI sector, both for domestic and international visitors.
- Independent players (80% of the food service market) are currently outperforming chained services (with the exception of fast-food), as a result of demonstrating greater attention to local consumer preferences and diversity. However, chained food services are capable of outperforming independent players on price due to superior economies of scale, and are increasing in prevalence.
- The Chilean Ministry of Health released a report in June 2015 stating that Chile had the third worst style of living in the region, after the United States and Mexico. More than half the population over the age of 15 is either overweight or obese and more than 80% of the population is sedentary. Government activism and consumer awareness on this topic are leading to growing demand for health and wellness products in the food service industry.
- The key sales factor in Chile is generally price. High Free Trade Agreement (FTA) involvement (Chile has 23 FTAs covering 61 different countries) has made it a very competitive market, and lower priced products from countries such as India and China often fare better than higher-priced European and North American products. However, Canal Horeca confirmed that we are seeing a rise in consumers' willing to splurge on higher quality goods and a higher interest in foreign products. This has shown in the emergence of American and European products in supermarkets here such as Tottus and Jumbo.

HRI Food Service past and expected sales, volumes and growth rates.

- The overall outlook for the Chilean hotel, restaurant, and institutional food service sector seems positive. In recent years the economic conditions of both the middle and lower-income segments have been improving – GDP per capita (PPP) in 2014 was US\$22,333 (the highest in Latin America). From now until 2030, total disposable income is expected to grow at an average annual rate of 4.2%. Poverty rates declined from 40.8% in 1990 to 6.8% in 2013. As a result of this, an increasing number of Chileans now have the means to access a wider variety of products and services.
- Consumption growth is expected to pick up over the next several years and register a healthy Compound Annual Growth Rate (CAGR) of 6.6% between 2014 and 2019.

Institutions:

- The institutional sector is comprised of establishments such as schools, enterprises, industrial companies, health institutions, airlines, leisure centers, retirement homes and prisons.
- In recent years subcontracted food service has experienced strong growth at 10-15% per year.

- Mining and educational institutions are the leaders in offering meal benefits. 80% of businesses provide their employees in-house food services or vouchers to eat at local restaurants and sandwich shops.

Restaurants:

- There are currently 31,859 food service outlets in Chile.

Table 2: Consumer Food service by Independent vs Chains: Units/Outlets 2014

Outlets	Independent	Chains	Total
100% Home Delivery/Takeaway	2,804	229	3,033
Cafés/Bars	8,841	206	9,047
Full-Service Restaurants	14,987	164	15,151
Fast Food	1,978	1,292	3,270
Self-Service Cafeterias	66	114	180
Street Stalls/Kiosks	994	184	1,178
Pizza Consumer Food service	1,721	262	1,983
Consumer Food service	29,670	2,189	31,859

Table 3: Consumer Food service by Location: Units/Outlets 2009-2014

Outlets	2010	2011	2012	2013	2014
Consumer Food service Through Standalone	16,398	18,833	21,576	24,366	26,390
Consumer Food service Through Leisure	283	331	390	453	501
Consumer Food service Through Retail	1,393	1,604	1,875	2,149	2,326
Consumer Food service Through Lodging	1,155	1,326	1,517	1,713	1,857
Consumer Food service Through Travel	488	568	670	754	784
Consumer Food service	19,717	22,662	26,028	29,435	31,858

Table 4: Value Sales and % Growth in Restaurants 2010-2014

Year	Full-Service Restaurants (in US\$ billion)	100% Home Delivery/ Takeaway (in US\$)	Fast Food (in US\$ million)	Self-Service Cafeterias (in US\$)	Street Stalls/Kiosks (in US\$)	Cafés/Bars (in US\$ million)	Total (in US\$ billion)
2010	1.44	127,738.1	485.7	42,158.1	13,317.4	438.3	2.36
2011	1.71	155,169.4	521.9	42,778.2	13,639.8	495.6	2.26
2012	2.02	180,485.1	584.6	45,524.2	14,081.0	574.7	3.35
2013	2.35	210,004.9	633.5	50,375.3	14,785.4	695.8	3.68
2014	2.59	221,965.0	698.6	45,183.9	14,908.5	715.8	4.01
2010-2014	12.46%	11.68%	7.54%	1.40%	2.28%	10.31%	11.19%

CAGR							
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Sources: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

- From these tables we can see that during the period 2010-2014 the largest sectors for restaurant growth were Full-Service Restaurants, 100% Home Delivery/Takeaway, and Cafés/Bars. Independent outlets have continued to dominate the market, and the main location for food service is through standalone.
- Shopping malls' recent emergence has offered new opportunities for international chains to fulfill their sales. Food service in retail is forecasted to grow at 7% over the next 5 years as the economy and consumer tastes continue to trend towards diverse flavors.
- Internet and smartphone penetration in Chile are high (in 2014 smartphone penetration among Chileans was 49.7%, the highest in Latin America), leading to the popularity of delivery sites such as PedidosYa.cl and QueHambre.cl. It is likely that operators will begin to include online ordering on their own websites.

Table 5: Forecast Sales in Consumer Food service by Location: % Food service Value Growth 2014-2019

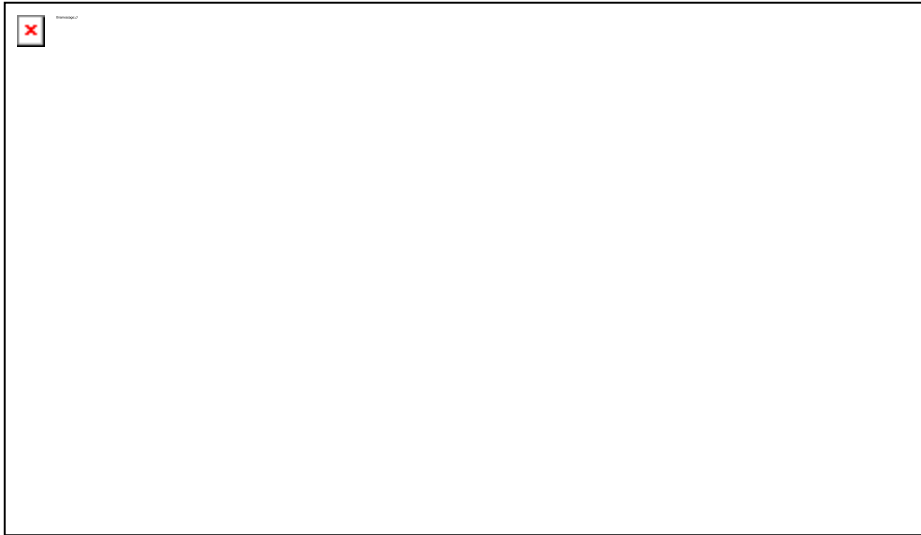
% Value Growth	2014/2015	2014-2019 CAGR	2014/19 TOTAL
Consumer Food service Through Standalone	10.4	10.3	63.6
Consumer Food service Through Leisure	10.7	12.6	81.1
Consumer Food service Through Retail	7.9	8.9	53.4
Consumer Food service Through Lodging	10.5	10.9	67.4
Consumer Food service Through Travel	9.7	10.7	66.4
Consumer Food service	10.1	10.3	63.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Hotels

- The number of hotels has been continually increasing over the past few years. In 2012 there were 1,034 establishments. Between 2013 and 2015 a 20% increase in the number of hotels was anticipated. This level of growth has been surpassed at an explosive level as the current number of hotels stands at 4,380. Canal Horeca concurred that the level of occupancy and development in hotels over the last few years has been much higher than expected.
- Tourism is forecasted to experience excellent growth from 2015-2017, growing at an annual rate of 7%. The number of tourists currently entering Chile is 4.09 million, with 53.9% remaining in the more developed central regions of the country. Hotels are expecting a distinguished boom opportunity from this growth.

Graph 1: Percentage of Hotels and Similar in Chile by type.



Source: National Institute of Statistics Chile

- The number of hotels in Chile is forecasted to total 5,990 by 2019, up from 4,380. Over the same period, hotel and restaurant industry value is expected to rise from US\$3.63bn to US\$4.18bn. International hotel chains have a large amount of potential as the market expands to second-tier cities in the country's relatively underdeveloped northern and southern regions.

Graph 2: Real Growth Indices of Fastest Growing Consumer Spending Categories: 2015-2030



Source: Euromonitor International from national statistics/UN/OECD

Advantages and Challenges.

Table 6: Advantages and Challenges to Entering the HRI Food Sector Market.

Advantages	Challenges
Chilean consumers have shown preference for American brands due to strong brand image entering into the mindset of consumers.	Chileans tend to be brand loyal and cautious in trying new brands.
The U.S. and Chile have a strong trading partnership due to the FTA agreement signed in 2004 and thus, US products are welcome in the market.	Price sensitivity can be an issue during a time of economic slowdown and shift in inflation.
Rising disposable incomes have stimulated interest in premium, foreign products. In addition, U.S. food products are known for their reliability and high standards, as they meet FDA and USDA standards.	Due to Chile's open trade and investment policy, there is a high degree of competition in the Chilean market.
There is an increasing demand for ready-meals and pre-prepared food due to the ever growing presence of women in the workplace, which will increase imports of these products.	There is a growing demand for gourmet products in Chile; however US products do not carry this image as much as their European counterparts.
Chileans are now demanding more choice not only in products in supermarkets but also in restaurants and cafés.	Many North American restaurant chains are quite similar; therefore this market can quickly become saturated.
Although Chile produces many local crops and products, they continue to import many of their bulk and intermediate products.	Portion sizes are often much smaller than in the US so supplier need to be flexible in producing new formats of their products.
Confectionary is very popular and is not expected to be affected by current obesity concerns in Chile. Over the period between 2014 and 2019, confectionery value sales are forecast to increase by 50.6%.	Importers will need to implement Chile's new nutritional labeling law requirements.

Value of imported food vs. domestic products over the past 5 years.

- Chile's agricultural resources are the base of its food industry. In 2014, exports of Chilean agricultural products (this includes forest and fishery products) totaled US \$17.5 billion, of which nearly US\$5.2 billion went to the United States. According to the Chilean Central Bank, Chile's agricultural sector (including forest and fisheries products) contributes to 7.8% of its overall GDP.
- Food imports in Chile are increasing due to a demand for more varied products, as well as Chile's numerous free trade agreements (FTAs) with various countries, such as Canada, Mexico, South Korea, the U.S., as well as with the European Union, EU.

Graph 3: Total Imports (CIF)-of Food and Live Animals from the world, SITC Classification 0-US\$ million.

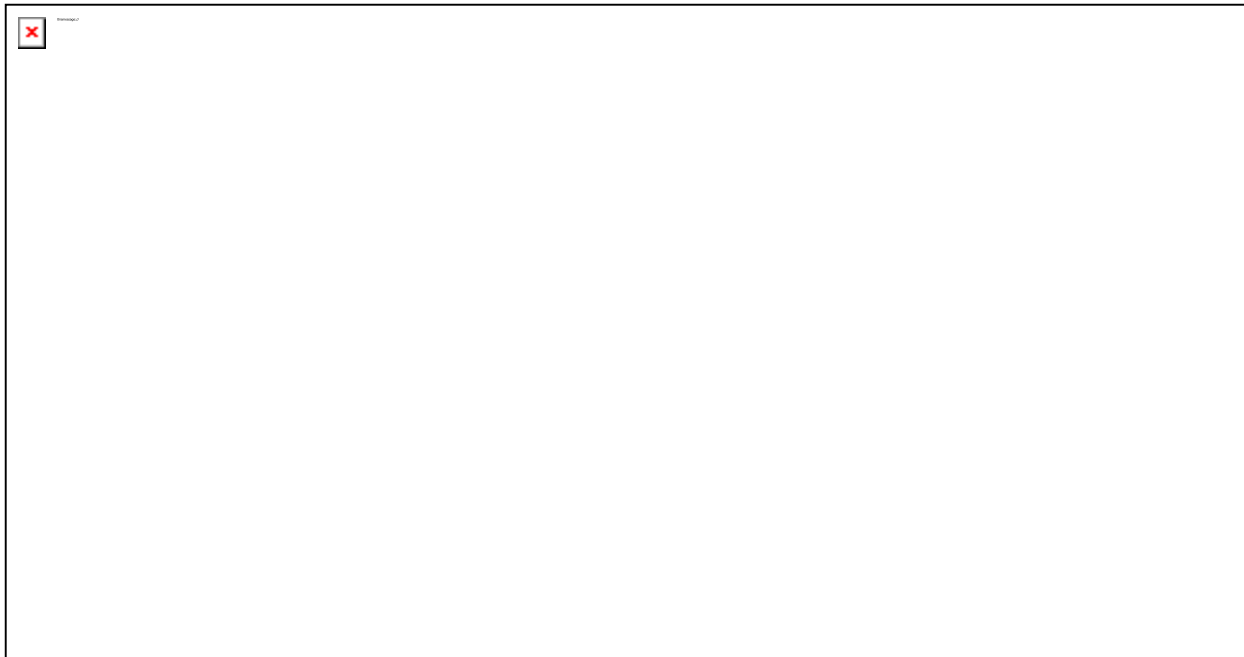


Source: Euromonitor International from United Nations (UN), International Merchandise Trade Statistics

Market Summary for Edible Fishery Products.

- Prospects for fish products in the HRI sector are not so extensive. This is because, as can be seen from the graph below, domestic production of fish in Chile is very high, keeping import levels low. Chile is a net exporter of fish products.
- Types of products that are typically imported are ‘gourmet’ fish products such as lobster, prawns, squid, and octopus. However, demand for this type of product is much lower, which is reflected - on import levels.
- The Food Imports Committee of the National Chamber of Commerce highlighted that *fresh* fish product sales in Chile have been decreasing over the past 5 years and are now almost non-existent. Especially within the HRI food service sector, chefs will use almost exclusively frozen fish products. This is to avoid any wastage of expired products, and also as they are usually pre-cut at time of freezing this means they are easier to prepare.

Graph 4: Chilean Market Size of Fresh and Frozen Fish and Seafood Products (Past 5 Years)



Source: Sernapesca

Author Defined:

Section II. Road Map for Market Entry

Market Entry Strategy.

- The most common and preferred way for foreign suppliers to enter the Chilean market is to appoint an agent, wholesaler, or distributor. The majorities of these firms are based in Santiago and are usually small to medium sized. Commissions from agents/distributors normally range from 5 to 10%, depending on the product. It is important to make sure that US exporters use a value-added distributor, who will not only ensure the products are properly distributed but also recommend to sellers the best ways to market the product and ensure maximum sales potential.
- If a U.S. exporter is expecting a large sales volume, requires local service support, or localized inventory, it is recommended to set up a local subsidiary of the company. The process of establishing an office takes around three weeks and costs around US\$1,500 for legal fees and US\$300 for commerce registry and notary confirmations.
- The business culture is highly conservative, and because franchising remains a new business model in the eyes of Chileans, there may be unwillingness to make the upfront investment, as well as weariness to expanding before results have been clearly documented.
- Strong connections are needed with the business community. Chile is a fairly small market in relation to the rest of the region, and a heavy emphasis is placed on relationships.
- After sales services and customer support are fundamental in both entering and maintaining a strong market position, and reputation holds a large amount of importance.

Market Regulations and American Companies' Ability to Meet Them

On the 21st April 2015 the new Chilean labeling laws were published, and importers will be required to

comply and implement the requirements of the law by June 2016. For more information on the new law, please refer to GAINs report CI1513.

Table 7: Limits on Food Content.

	ENERGY (KCAL/100G)	SODIUM (MG/100G)	TOTAL SUGARS (G/100G)	SATURATED FATS (G/100G)
Limits on solid foods. Values greater than:	275	400	10	10
	ENERGY (KCAL/100ML)	SODIUM (MG/100ML)	TOTAL SUGARS (G/100ML)	SATURATED FATS (G/100ML)
Limits on liquid foods. Values greater than:	70	100	5	3

- Packaged goods need to show the country of origin as well as the net weight or measure of the contents. The quality, purity, ingredients or mixtures need to be marked as well. Goods that do not comply with these labeling and marking requirements will be allowed into the country but the products will not be able to be sold until the labels have been changed to fulfill the requirements.
- Packaged goods must be labeled in Spanish.
- Franchise companies will be subject to local trade laws as there are no specific Chilean laws related to the franchising industry. However, U.S. franchises do still derive benefits from the U.S. Chile Free Trade Agreement. U.S. companies should register their trademarks before entering the market.

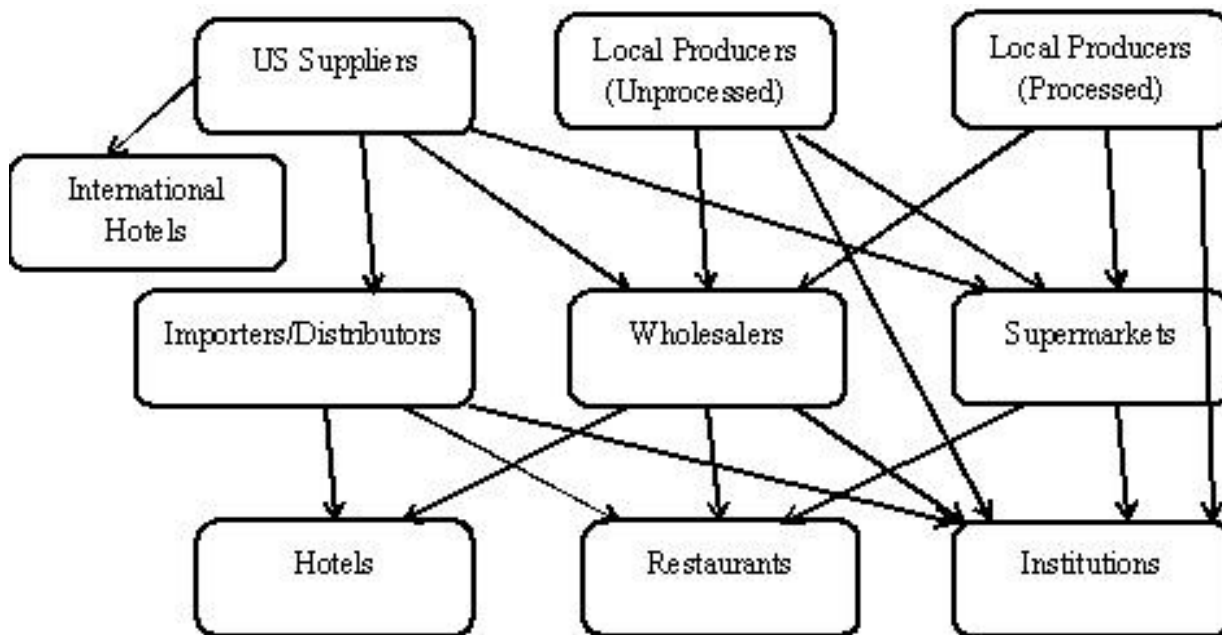
For more information on exporting to Chile from the U.S. please visit: <http://www.export.gov/chile/>

Market Structure.

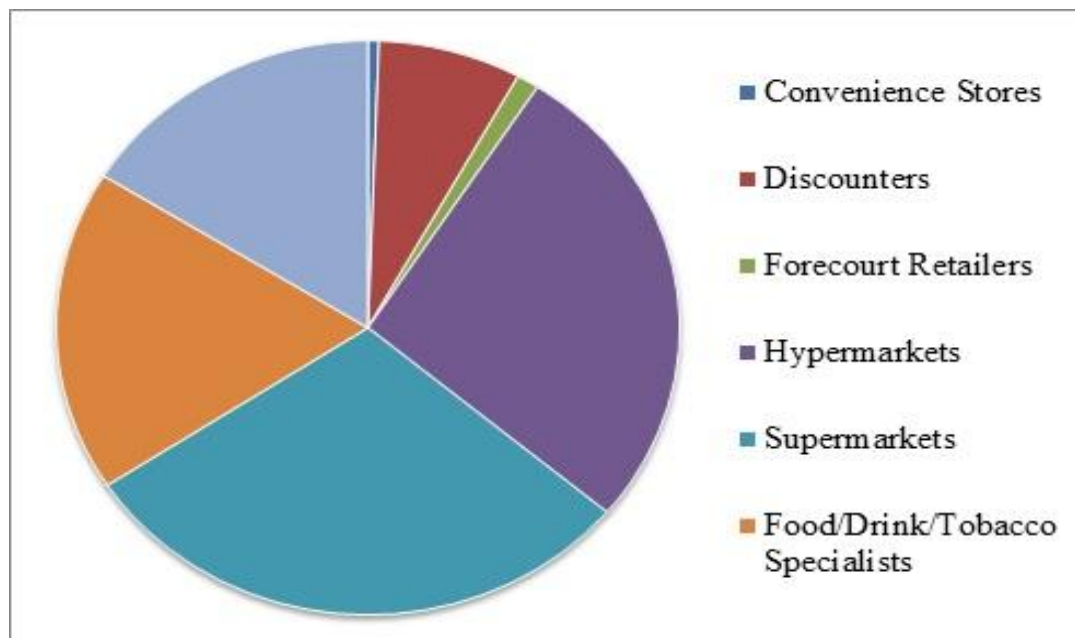
Distribution Channels:

- The HRI sector typically does not import products directly, but instead contracts with local distributors; almost all foreign companies wishing to sell food products in Chile must take this route.
- Many distributors are active delivering products to clients in the HRI sector, as well as supermarkets and other food outlets. Distributors will usually ask the end client to pay for transportation costs outside of Santiago or will already have these additional costs worked into their prices.
- Distribution channels for domestic products are the same as international, except in the case of direct transportation to institutions. Restaurants and hotels will still receive access to domestic products through wholesalers and supermarkets. International hotels and restaurants may have their own distribution networks arranged by company headquarters.

Graph 5: Distribution Flowchart.



Graph 6: Retail Value by Outlet: 2014.



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

Market Players: Supermarkets and Hypermarkets

- Supermarkets and hypermarkets combined accounted for 50% of total grocery retailers value sales in 2014, and expected to grow. Hypermarkets are experiencing barriers to expansion because of low availability of urban land.
- The market is heavily controlled by just four companies: Walmart Chile (www.walmartchile.cl), Cencosud (www.cencosud.com), Falabella (www.falabella.com/fabella-cl), and Unimarc (www.unimarc.cl) (See table for market shares by outlet).

Market Players: Distributors

- The three main distributors are Importadora Café do Brasil (www.icb.cl), Velarde Hermanos (www.velarde.cl) and SDO Comercial.
- Smaller hotels and restaurants depend on distributors or specialty importers/resellers, and tend to make purchases with greater frequency and in smaller quantities.
- The institutional market buys more products directly from local producers or imports because the companies have their own purchasing center and storage facilities.

Market Players: Wholesalers

- This is a system of free-service supermarkets primarily targeting shop owners, restaurants, hotels and large families.
- Grupo SMU, the company that operates Unimarc supermarkets, controls over 50% of the market share with their two outlets, Mayorista 10 and Alvi Club Mayorista. There are a number of small market players who focus on importing specific products rather than covering the whole market.

Table 8: Retail Format and Percentage of Market Holding by Storefront

Storefront	Company	% Retail Value (2013)	% Retail Value (2014)
Hiper de Lider	Wal-Mart Chile SA	12.9	13
Unimarc	SMU SA	7.8	7.7
Jumbo	Cencosud Supermercado SA	7.5	7.2
Santa Isabel	Cencosud Supermercado SA	7	6.7
Express de Lider	Wal-Mart Chile SA	3.6	3.8
Tottus	Falabella SACI	3.5	3.7
Bodega Acounta	Wal-Mart Chile SA	2.2	2.5
Mayorista 10	SMU SA	2.3	2.2
Alvi	SMU SA	1.1	1.1
Bigger	SMU SA	0.9	0.9
Ekono	Wal-Mart Chile SA	0.8	0.8
Spacio 1	Petrobrás Distribuidora SA	0.3	0.3

OK Market	OK Market	0.3	0.3
Big John	Big John SA	0.2	0.2
Punto	Cía de Petroleos de Chile SA	0.2	0.2
Pronto	Cía de Petroleos de Chile SA	0.2	0.2
Vaivén	Empresa Nacional de Energía Enx SA	0.2	0.2
Shell Select	Empresa Nacional de Energía Enx SA	0.1	0.1
Erbi	Sociedad Comercializadora de Productos al Detalle SA	0.1	0.1
Others	Others	48.9	48.9

Source: Euromonitor, trade associations, trade press, company research, trade interviews, trade sources.

Table 9: Percentage of Market Holding by Company.

Company	% Retail Value (2013)	% Retail Value (2014)
Wal-Mart Chile S.A.	19.5	20.1
Cencosud Supermercado S.A.	14.5	13.9
SMU SA	12.1	11.9
Falabella S.A.C.I.	3.5	3.7
Cía de Petroleos de Chile S.A.	0.4	0.4
Petrobras Distribuidora S.A.	0.3	0.3
OK Market	0.3	0.3
Empresa Nacional de Energía Enx S.A.	0.3	0.3
Big John S.A.	0.2	0.2
Sociedad Comercializadora de Productos al Detalle S.A.	0.1	0.1
Others	48.9	48.9

Sub-Sector Profiles

Hotels and Resorts:

- A number of worldwide hotel enterprises currently have hotels in Chile (see below). Many of these, such as the Marriott Courtyard, DoubleTree by Hilton and Hyatt Place have opened in the last two years. For 2015, investment of US\$ 121 million is expected in this sector, according to the hospitality consulting firm, Horwath HTL. However, Santiago experienced a 14.1% drop in occupancy to 57.4% in May 2015, in comparison to May 2014.
- Canal Horeca reported that in the last 5 years they have witnessed a big change in the hotel sector. This market has opened up, with the development of not only a number of 5 star hotels, but also smaller 3-4 star 'boutique' hotels. These boutique hotels are aimed at clients who are looking for a high-quality, but more personalized experience.

Table 10: Hotels Sub-Sector Profiles.

Company	Sales (worldwide 2014) (US\$)	Institute name, & Number of outlets (Chile)	Location
NH Hotel Group	1.38bn	NH Hotel, NH Collection / 4	Europe, the Americas, Africa
Starwood Hotels and Resorts Group	5.98bn	W Hotel, Sheraton, The Luxury Collection, Four Points / 7	Worldwide
Marriott Hotels	13.8bn	The Ritz-Carlton, Renaissance Hotel, Marriott Hotel, Courtyard Hotel / 4	Worldwide
InterContinental Hotels Group	1.86bn	Holiday Inn Express, Crowne Plaza, Hotel InterContinental, Holiday Inn / 9	Worldwide
Hyatt Hotels Corporation	4.42bn	Grand Hyatt, Hyatt Place / 2	Worldwide
Accor Hotels	5.95bn	Mercure, Ibis, Novotel / 8	Worldwide
Hilton Worldwide	10.5bn	Hilton Garden Inn, DoubleTree by Hilton, Hampton by Hilton / 3	Worldwide

- Many hotel chains are taking advantage of the sector's increased investment in modern technology and professional staff's international knowledge, giving hotel cuisine a reputation of sophistication and high quality. In addition, recent years have seen the creation of hotel happy hours to attract more customers to their bars and restaurants on a daily basis.
- Hotels only import special food products required by their hotel headquarters. Basic produce such as dry goods, dairy products, fresh fruit and vegetables, meat, seafood are bought locally through distributors, fresh markets, wholesalers, and, most of the time in smaller quantities, but more frequently.
- New boutique hotels have focused on using organic products, and aiming to create a wider variety of food in their restaurants. This is why they will charge a higher price for their hotels, as they are offering a more superior quality of service.
- The table below shows some examples of different restaurants that these hotels offer, showing the diversity of cuisines now offered. In addition to this, most hotels offer 24 hour room service and have a mini bar that may offer snack foods as well.

Table 11: Hotel Restaurant Cuisine.

Hotel	Restaurant Name	Type of Cuisine
NH Hotel	NH Restaurant	International, typical Latin American
W Hotel	Terraza / Osaka / NoSo	Chilean and Mediterranean / Sushi and Asian fusion / French
Sheraton	El Cid / El Bohio	International Gourmet / Seasonal Grill Specialities
Ritz-Carlton	Estro / The Lobby Lounge /	Local and artisanal ingredients used to create

	Café Ritual	flavoursome international dishes / Afternoon Tea / Snacks, drinks, cakes
Renaissance	Catae Restaurant	Typical Chilean cuisine
Crowne Plaza	Caruso Restaurant / The Lounge / Trafalgar Bar & Buffet	Mediterranean and typical Chilean cuisine / snacks, drinks, cakes / Buffet
Intercontinental	2920 Grill / Pasta & Basta / Temple	Premium quality seafood and steaks / Italian / Japanese fusion
Grand Hyatt	Anakena / Matsuri / Senso / Atrium Lobby Lounge	Thai, World Specialties and a selection of fish, seafood and meat / Japanese / Mediterranean / Afternoon Tea

Institutional

- The two largest sectors under the institutional bracket are the mining and education sector.
- The three principal institutional companies are Sodexo Chile, S.A., Central de Restaurantes Aramark and Compass Catering, S.A., which together make up 64% of the total sector. As reported by Canal Horeca, this is a sector with a large amount of demand. However, the extensive size of these 3 companies mean that this demand is already covered, which limits the entry of competing companies to the institutional market.
- Although institutional companies traditionally import locally to their own purchasing centers, they will also use international imports for special produce that cannot be sourced locally, such as unique spices and top-quality meats.
- Carlos Salazar, President of the Food Imports Committee of the National Chamber of Commerce, underlined the diversity of production in this sector. The institutional companies attend to each separate channel – for example having different foods for the education sector, the mining sector, and the Armed Forces. The majority of these products need to be pre-prepared and ready-to-serve, due to the volume of consumers.

Table 12: Institutional Sub-Sector Profiles.

Company	Sales (worldwide 2014) (US\$)	Institute name & location	Location	Purchasing Agent Type
LSG Sky Chefs Chile S.A.	2.9 bn	Various airlines of which Air Canada, Air France, American Airlines, Delta Airlines, GOL Transportes Aeros, LAN airlines, Sky Airlines, TACA International airlines and TAM Mercosur are operating in Chile	Worldwide	Direct Import
Compass Catering S.A.	26.4bn	Caffé Gratto; Outtakes kiosks and shops; Scolarest; Sabromerals; Medirest, (restaurants and shops) in schools, company Cafeterias	Worldwide	Direct Import

		and kiosks, industries, health institutes		
Central de Restaurantes Aramark	14.8 bn	Getaway bistro/café; Soluna café/bakery (cafés) in schools, universities, health institutes, company Caféterias, mining companies	In 16 countries worldwide	Direct Import
Casino Express	-	Restaurant Casino Express; Banquetería Lo Águila, in industries, company Caféterias, schools, health institution	Nationwide	Direct Import
Sodexo Chile S.A.	19.8 bn	Company Caféterias, defense, schools and universities, health institutes, prisons, retirement homes, sports/leisure centers	Worldwide	Direct Import
Newrest	993.43 mn	Newrest Catering (restaurants and shops) in public/private company Caféterias, health institutions, schools and universities, remote site services i.e. mining	Worldwide	Direct Import

Restaurants

- Chileans will usually eat out for lunch in the middle of the working day which means choice is often limited by proximity to the office. Customers may choose outlets that normally would not be their first choice. This is another area with opportunity for new players to enter the market.
- As the following table displays, Chilean restaurants are still very much present in the market. However, the prevalence of worldwide enterprises is increasing, as volumes and sales show.
- Sources indicate that there has been a visible rise in restaurant spending in Chile, which has motivated the arrival of foreign enterprises. There is a wider variety of types of food in the restaurant sector, in particular Asian restaurants, across all price points. One example of this is a large expansion of sushi restaurants in Chile.
- Wine production in restaurants is also on the rise. A type of ‘vinoturismo’ (wine tourism) is appearing in Chile, where consumers will visit a restaurant based on recommendation of their wines rather than the food. This is a trend that has not been prevalent in Chile until recent years. Beer consumption, particularly artisanal brands, has also increased. Chile has experienced growth from 30 to 1000 brands of beer in the past decade.
- Restaurants are also trying to attract more customers using innovative promotion events, such as Santiago Dining Week, where a number of higher priced restaurants will offer set menus for lunch or dinner at reduced prices, with the aim of attracting customers who would not normally visit these types of restaurants.

Table 13: Restaurant Sub-Sector Profiles.

Company	Sales (all locations 2014) (US\$)	Institute Name, (Type) & Number of Outlets in Chile	Location	Purchasing Agent Type
Yum! Brands Inc	13.3 mn	Kentucky Fried Chicken, Taco Bell, Pizza Hut, (fast food restaurants) / 111	Worldwide	Third-Party Distributors
Fast Food Chile S.A.	1.06 bn	Burger King, (fast food restaurants) / 32	Worldwide	Third-Party Distributors
Gastronomía & Negocios	150 mn	Mamut, Doggis, Juan Maestro, and Bob's (restaurants) / 250	Nationwide	Third-Party Distributors
Gate Gourmet	3.2 bn	Starbucks, (coffee shops) / 30	Worldwide	Third-Party Distributors
Orion Group	1.12 bn	Juan Valdez Café, (coffee shops) / 22	Worldwide	Third-Party Distributors
Dominó Fuente de Soda	244.4 mn	Dominó, (restaurants) / 21	Nationwide	Third-Party Distributors
Ruby Tuesday Inc	1.17 bn	Ruby Tuesday, (restaurants) / 10	The Americas	Third-Party Distributors
Tip y Tap	7.69 mn	Tip y Tap, (restaurants) / 8	Santiago	Third-Party Distributors
DineEquity Inc	654.99 tn	Applebee's Grill and Bar (restaurant) / 4	The Americas	Third-Party Distributors
Schopdog S.A.	77.2 mn	Schopdog, (restaurants) / 29	Nationwide	Third-Party Distributors
Dunkin' Brands Group Inc	211.4 mn	Dunkin' Donuts, Baskin Robbins / 38	Worldwide	Third-Party Distributors
Telepizza S.A.	159.8 mn	Telepizza (pizza restaurant and takeaway) / 31	Europe & Latin America	Third-Party Distributors
Papa John's International Inc	1.22 bn	Papa John's (Pizza Delivery and Takeaway) / 7	Worldwide	Third-Party Distributors
Pizza Pizza Ltd	155.4 mn	Pizza Pizza, (Pizza restaurant) / 25	Nationwide	Third-Party Distributors
Domino's Pizza Inc	1.99 bn	Domino's Pizza, (Pizza Delivery and Takeaway) / 19	Worldwide	Third-Party Distributors
Tavelli S.A.	34.3 mn	Tavelli (Italian style Café and ice cream parlour) / 15	Nationwide	Third-Party Distributors
Arcos Dorados	3.65 bn	McDonalds (Fast food restaurant) / 77	Worldwide	Third-Party Distributors

Sources: Company websites and Press Information, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Full-Service Restaurants:

- Independent restaurants make up the vast majority of the full-service sector, with 93% value share in 2013. Full-service restaurants' sales grew 17% in 2013, encouraged by an eating-out culture, in addition to Chile's strong economic growth.
- Full-service restaurants cater to all different income categories, from premium, exclusive restaurants to a high volume of independent, lower-priced full-service restaurants.

Fast food:

- Fast food sales are on the up (8% in 2013) and the average spend on fast food has increased according to Canal Horeca, but due to rising health concerns, sales have been increasing at a slower rate. Moreover, growing disposable incomes and elevated willingness to experience different cuisines has reduced fast food restaurants' role in the food service sector.
- As a result of this, there is an increasing amount of variety in the fast food sector – be that either in the type of product or the ingredients that restaurants are using, to maintain a level of competition.
- Fast food restaurants are generally chains, with the most prominent fast food chain being Doggis, a local hot dog brand which has a 44% share in the fast food category.

Delivery/Takeaway:

- Home delivery/takeaway value sales grew 16% in 2013 to reach US\$209.9 million. The sector is categorized by independent players who dominate both size and growth.
- Traditionally, delivery is dominated by pizza and sushi but recently alternatives products have been successful, such as Chinese, Thai, sandwiches and Italian food. Takeaway culture is currently less established than delivery.
- Independent 100% home delivery/ takeaway have a majority share in the market, 57%, with chained stores making up the rest. The majority of chained stores are pizza brands such as TelePizza, Pizza Hut, Domino's, Papa John's and Pizza Pizza, with Sakura Express being the most dominant Asian Food delivery chain.

Cafés:

- In Santiago there are over 4,000 cafés, with coffee consumption increasing each year. The number of cups of coffee consumed per capita per year in Chile has risen from 162 in 2009 to 191 in 2014. The two major franchises are Juan Valdez and Starbucks but the vast majority of cafés are independently owned.

Section III. Competition

Table 14: Competition by Country of Origin.

Chapter*	Major Supply Sources	2014 Imports (US\$mn)	5-Yr CAGR 2010-2014 US\$ CIF Value	Import Tariff Rate**	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Chapter 2	1. Brazil – 33%	1,116.86	33%	0-26.4%	The implementation of the FTA has allowed USA imports of poultry and other meat to Chile to increase.	Regional beef production is competitive.
Meat and Edible Meat Offal	2.					
Net Imports:	Paraguay – 23%					

387.177 tons	4. USA – 15%					
Chapter 3	1. Ecuador – 45%	61.34	86%	0-15%	Many premium seafood products are imported. Imports from Asia are cheaper than local produce.	One of Chile's main export markets is fish, so there is a lot of local produce; however imported fish is often cheaper.
Fish and Crustaceans, Molluscs and Other Aquatic Invertebrates	2. China – 25%					
Net Imports: 31.212 tons	6. USA – 2%					
Chapter 4	1. New Zealand – 34%	203.22	188%	1.1-20%	Argentina offers low prices and is also in a good location for exports to Chile. However, US products are also widely accepted.	Local production levels exist to meet much of the domestic demand.
Dairy Produce; Birds' Eggs; Natural Honey; Edible Products of Animal Origin, not Elsewhere Specified or Included	2. USA – 23%					
Net Imports: 77.605 tons	3. Argentina – 23%					
Chapter 7	1. Canada – 21%	76.16	41%	0-29.8%	There are many opportunities for foreign imports of vegetables in Chile's off-season. The USA is a strong competitor in this sector.	Chile produces many of its vegetables within the country and they are widely distributed, particularly through local channels. Due to Chile's Southern Hemisphere location they can grow crops during the opposite seasons.
Edible Vegetables and Certain Roots and Tubers	2. USA – 20%					
Net Imports: 138.756 tons	3. Peru – 18%					
Chapter 8	1. Ecuador – 40%	183.42	78%	0-29.8%	Because the USA has opposite seasons to Chile, this opens opportunities for exports during time when local production isn't possible. Imports from Ecuador are decreasing as those from the USA increase.	Many areas of Chile produce fruit and nuts locally. However, this is not possible year-round so imports are necessary.
Edible Fruit and Nuts; Peel of Citrus Fruit or Melons	2. USA – 33%					
Net Imports: 309.227 tons	3. Peru – 10%					
Chapter 9	1. Sri Lanka – 24%	124.32	30%	0-6.4%	Coffee consumption is constantly developing and customers are demanding more variety and higher quality products. Nestlé coffee is very popular with a 63% share in the market	Volume growth in coffee is decreasing, but value growth is on the rise. Customers seek coffee with a gourmet appeal. Although not a
Coffee, Tea, Maté and Spices	2. Brazil – 20%					
Net Imports: 132.646 tons	5. USA – 5%					

					(2014). Tea (especially green, white and red) is also very popular due to recent health concerns.	main market, local coffee production in Chile is still relevant.
Chapter 10	1.	688.95	40%	0-	Cereals grew in by 10% in 2014. Products containing fortified or functional ingredients, such as muesli, are very popular due to the recent health and wellness trend.	International companies such as Nestlé, Evercrisp and Kellogg held 66% of the cereals market in Chile in 2014, while domestic players will account for 33% of sales.
Cereals	Paraguay – 29%			11.2%		
Net Imports: 2.552.094 tons	2. Argentina – 27%					
	4. USA – 16%					
Chapter 16	1.	172.61	74%	0-35%	Readily accessible, pre-prepared products are on the rise with more and more Chileans leading busy lifestyles. Preparations of meat, fish and other seafood products are popular among Chileans. Imports are cheaper from Asia so this is why they currently have a higher share in the market.	Domestic preparations of meat and fish are readily available in Chile.
Preparations of Meat, of Fish or of Crustaceans, Molluscs or Other Aquatic Invertebrates	2. Ecuador – 29%					
Net Imports: 121.694 tons	Thailand – 24%					
	5. USA – 3%					
Chapter 17	1.	334.11	1%	0-	In recent years there has been a boom in Chile's snack consumption, especially sugary snacks. Sweets from Chile's neighboring supplying countries are often sweeter than those from the USA.	Chileans appreciate local produce and artisan products and often remain loyal to Chilean produce.
Sugars and Sugar Confectionery	Colombia – 28%			12.2%		
Net Imports: 731.914 tons	2. Guatemala – 20%					
	5. USA – 4%					
Chapter 18	1. Brazil – 28%	141.33	47%	0-10%	Chocolate confectionery value sales grew by 8% in 2014. Premium quality products and rising prices will continue to drive growth and this will provide more opportunities for US exports to Chile.	Although cocoa prices have risen in recent years, consumers have not reduced their consumption as a result of this. Empresas Carozzi SA is the current leader with 37% of market value.
Cocoa and Cocoa Preparations	2. Argentina – 14%					
Net Imports: 98.995 tons	4. USA – 9%					
Chapter 19	1.	192.29	48%	0-	This category offers opportunities for development, as consumers look for variety and innovation.	Local production is also increasing, for example with frozen prepared food products.
Preparations of Cereals, Flour, Starchy or Milk; Pastrycooks'	Argentina – 24%			17.5%		
	2. Peru – 11%					

Products	3. USA –					
Net Imports: 315.791 tons	10%					
Chapter 20	1.	220.16	85%	0-	Like other prepared	Local producers
Preparations of	Belgium –			131.8%	foods, there are	will take advantage
Vegetables,	15%				opportunities for	of growing
Fruit, Nuts or	2.				innovation and	opportunities in this
Other Parts of	Argentina				development in this	sector and adapt
Plants	– 11%				sector. Products such as	their products to
Net Imports:	3. USA –				individual portion-sized	suit consumer
412.270 tons	9%				vegetable bags and pre-	demand.
					cut fruit are increasing	
					in popularity, which will	
					open up opportunities	
					for US exports to Chile.	
Chapter 21	1. USA–	299.81	50%	0-20%	Sales of	There are many
Miscellaneous	32%				packaged/prepared food	Chilean brands that
Edible	2. Brazil–				are rising with the shift	already provide
Preparations	10%				from traditional areas	packaged foods.
Net Imports:	3.				such as weekly markets	However Chileans
264.883 tons	Argentina				or independent grocery	are looking for
	– 7%				retailers. Trends moving	more variety and
					towards more hectic	high quality
					lifestyles are pushing	products, and this is
					Chileans of all social	where there are
					classes to consume more	opportunities for
					packaged food.	imports.
Chapter 22	1.	379.59	95%	0-	Beers, spirits, and soft	Chilean wine is a
Beverages,	Mexico –			17.5%	drinks are often	strong competitor
Spirits and	24%				imported and imports	in the world market
Vinegar	2. USA –				will continue increasing	as they have a good
Net Imports:	21%				as consumers demand	balance between
704.958 tons	3. UK –				more variety.	quality and price.
	10%					The Chilean and
						Peruvian drink
						pisco is the main
						spirit of choice.

Source: Chilean Customs

* Only chapters relevant to the Chilean market/HRI food service sector have been included.

** 0% after full implementation of FTA. The 2004 FTA states that the majority of products have no tariffs now, while the rest will be fully phased out within 12 years.

Source: For detailed import information about different products, please visit the following: <http://www.direcon.gob.cl/wp-content/uploads/2010/12/Lista-de-EE.UU-Anexo-3.3-OPT.pdf>

Section IV. Best Product Prospects

Category A: Products Present in the Market That Have Good Sales Potential

Table 15: Products Present in the Market That Have Good Sales Potential.

Product Category	Market	Imports	5 Year	Import	Key Constraints	Market
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	Size (Volume 2014)	(US\$ 2014)	Average Annual Import Growth (2010- 2014)	Tariff Rate*	Over Market Development	Attractiveness for USA
Healthier/diet/light soft Drinks	1.03 billion litres	1.58 billion	Value CAGR: 13.23%	0% to 17.5% depending on product	Slowdown in growth of the main category of soft drinks in terms of volume of sales (carbonates), will impact growth rates negatively for the forecast period (2014- 2019). Juices, concentrates, and bottled water (which are growing in popularity) do not have the sales base to account for and drive total growth for the industry.	Consumers prove to be increasingly interested in soft drinks that may offer a balance between health properties and a good taste. Coca- Cola released Coca- Cola Life, marketed to be a more natural and healthy version of traditional Coca- Cola. There is space in the market for similar products. We will see an increasing shift among Chilean consumers towards alternatives perceived as healthier, such as flavored bottled water, juice and ready-to-drink tea.
Sweet & Savoury Snacks	55,700 tonnes	262.2 million	Value CAGR: 9.66%	0% to 12.2% depending on product	The new government regulations on the packaging of food products that contain “excessive” levels of sugar, sodium and/or fat could negatively impact sales.	The premium food categories within packaged food in Chile have spread to sweet and savory snacks. Focus on health and wellness and ingredients encourages growth in premium snacks.
Spirits	587.95 million litres	3.74 million (2013 – available data)	Value CAGR: 7.48%	0% to 17.5% depending on product	Spirit performance in 2014 was weak due to the economic deceleration in the second half of the year as well as rum sales continuing to fall.	Pisco is traditionally the favorite spirit in Chile (49% of all spirits total volume sales in 2014). Nevertheless, the increasing number of options in the Chilean market represent a challenge to pisco. This will open the market for imports, especially

						innovative new takes on current products such as Jack Daniel's Tennessee Honey.
Premium Fast-Food	3,270 outlets (all fast-food)	698.64 million (all fast-food)	Value CAGR: 8.8% (all fast food)	-	Continued development of health and wellness trends, in addition to increased awareness of diseases like obesity and diabetes will continue to drive some consumers away from fast food.	Several international players such as Fuddrucker's and Wendy's, who tend to offer an upgraded and more premium experience to consumers in comparison to traditionally established chains in the country such as McDonald's and Burger King, have entered the market. These types of chains can be especially popular in affluent areas where customers are willing to pay more.

**0% after full implementation of FTA. The 2004 FTA states that the majority of products have no tariffs now, while the rest will be fully phased out within 12 years (2016).*

Category B: Products Not Present in Significant Quantities but Which Have Good Sales Potential:

- The food service sector as a whole is already very concentrated and highly competitive. Per capita food consumption is already very high (US\$1,530 in 2014), and so premium, gourmet and specialty food products are expected to be one of the main areas for development. Forecasted increases in consumption will boost demand for premium and innovative products and services.
- There is an opportunity for a higher quality, premium café service with professional baristas. Only 5% of cafés are officially considered “specialty cafés”, which means that all processes carried out by the café are of excellent quality. Of the 152 cafés that are “specialty cafés”, only 50 fully fulfill the requirements of having: a good environment, strong infrastructure and professional baristas.
- As obesity, diabetes and health issues related to being overweight increase, awareness of these problems among consumers is also rising. This is leading to a consumer shift. With health and wellness trends becoming more evident; health food products, cereal, gourmet ready-to-serve and ethnic produce all have good sales potential although they are not yet present in the market with any volume.
- Frozen foods are important in the food service sector, as they cause less shrinkage, and are closer to ready-to-serve, making them ideal for this sector. This market has great potential over the next few years and sources suggest that U.S. products will have a lot of success in this market.
- The biggest trend expected in the next ten years is a surge in the demand for organic foods, and those that bear the FairTrade label. Some example products they expect to see this trend in are coffee and chocolate. A rise of products with new, innovative flavors is also anticipated.

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Category C: Products Not Present Because They Face Significant Barriers:

- There are some exceptions to Chile's general free-market price policy. Some of the main agricultural products such as wheat, sugar, and products containing sugar are mainly produced locally because they fall under a certain price-band system. Fluctuations in international market prices may cause these price bands to change.
-

Section V. Executive Summary and Recommendations.

- The overall view of the HRI food service sector is promising. Chile's strong economic foundations have allowed for a high level of development and modernization in recent years. The size of the middle class in Chile continues to expand, creating increased purchasing power. This, along with changing lifestyle trends, such as more women in the workplace, and factors such as business tourism, are leading to rapid growth in consumer food service, a trend which is expected to continue over the next few years. Hotels, currently the biggest investment sector of the HRI market, are expected to continue to thrive and this will provide development opportunity for U.S. producers. Chains and international restaurants continue to enter the market each year. Subcontracted food service in the institutional sector is constantly growing, with providers developing products to suit each sub-sector.
- Imports into this sector are important. As Chilean consumers look for more variety, they will turn towards foreign brands. U.S. products generally fare well in Chile as they are known for quality, reliability and innovation. Since the implementation of the Chile-USA Free Trade Agreement in 2004, U.S. exports to Chile have increased by a five-fold to nearly US\$1 billion in 2014, import tariffs were reduced to zero. However, U.S. products face a certain amount of competition from other countries when entering the Chilean market. These tend to be either from Chile's neighboring countries, or Asian countries who can offer lower priced products – as price is a considerable factor for many Chileans. U.S. producers are advised to check that their products meet the most up to date Chilean regulations to ensure a straightforward entry strategy into this market.
- Industry sources expect that there will be some development in specialized, high-quality products because of the growing sophistication of the Chilean consumer. Within mass consumption there will not be many changes, but there is certainly a growing niche market for premium products, and those that have not previously been present in the market, such as health and wellness foods. On the other hand, there is also a rising demand for well-priced, ready-to-serve products. There is a high level of consumer segmentation between those who are willing to spend more and those who are not. For example, for higher priced products, producers may look at only exporting to distributors for restaurants and hotels in the north-east zone of Santiago, where most of the consumers have higher income rates and are willing to spend more. To aim at mass consumption, exporters will need a price that is competitive with local products. However if they are aiming for the niche, sophisticated consumer market they will need to be prepared to sell smaller quantities of their products because of the higher price tag.
- Foreign suppliers will have to consider their market entry strategy. The recommended system is

to follow the Chilean strategy of appointing an agent, wholesaler or distributor. Exceptions to this are international hotels and restaurants which may have distribution channels organized by their headquarters. This can often mean that instead of buying in bulk, hotels and restaurants will buy in small quantities, as and when they need them. In Chile, buyers' comprehension of the food service market is limited to a certain degree, meaning that their purchasing strategy often does not differ from retail.

Section VI. Contact and Further Information.

Tradeshows:

NAME: Espacio Food & Service

Date: 2-4th September 2015

Frequency: Annually

Contact: N/A

Location: Av. El Salto 5000, Huechuraba, Santiago de Chile

Tel: +56224704460

Email: foodandservice@espacioriesco.cl

Web: <http://espaciofoodservice.cl/2015/>

Profile: This event will take place in the Espacio Riesco Convention and Event Center, and will act as a platform for companies in the market who are looking to make new business relations, while also looking for new business opportunities such as new products, equipment and services. The expo will be a place to meet, exchange ideas and foster new business alliances. Each year more than 14000 attend to better understand the sector.

NAME: Echinuco

Date: 2nd-4th October 2015

Frequency: Annually

Contact: Alejandra Jarpa / Consuelo de la Cuadra

Location: Parque Bicentenario, Vitacura

Tel: N/A

Email: alejandra@echinuco.cl / consuelo@echinuco.cl

Web: <http://www.echinuco.cl/>

Profile: Echinuco is focused on the improvement and international promotion of Chilean cuisine. They encourage micro and small companies to come to the show to share ideas, gain new contacts and learn more about opportunities in the sector.

NAME: Mercado Paula Gourmet

Date: 22nd-25th October 2015

Frequency: Annually

Contact: **Silvia Ossandon** / Paula Minte

Location: Parque Araucano, Las Condes, Santiago

Tel: +56225507988 / +56225507989

Email: sossandon@paula.cl / pminte@paula.cl

Web: <http://www.paula.cl/etiqueta/mercado-paula-gourmet/>

Profile: Mercado Paula Gourmet will be taking place for the 8th time in Parque Araucano this October. This is a huge event focusing on gastronomy for both Chilean and international producers. It is a great display opportunity to widen your client base as consumers will come to enjoy cooking classes, pop up restaurants and music. This is an excellent opportunity for producers of gourmet food, cooking utensils, or those with international restaurants or food trucks.

NAME: Expo Food Process

Date: 4th-6th November 2015

Frequency:

Contact: Katherine Becker S. - International Area Manager

Location: Espacio Riesco Convention Center, Avenida El Salto 5000, Santiago, Chile

Tel: +56 2 2530 7238

Email: kbecker@fisa.cl

Web: <http://www.foodprocess.cl/index.php>

Profile: Expo Food Process is an international exhibition and congress for Technologies and Solutions for Food and Drink Production. This exhibition offers the opportunity to meet industry experts, to try out new technologies and solutions, and to find out more about supply and demand in this sector.

NAME: PMA Fruit Trade Latin America

Date: 11th-12th November 2015

Frequency: Yearly

Contact: Nancy Tucker –Vice President of Global Development PMA

Location: Espacio Riesco Convention Center, Avenida El Salto 5000, Santiago, Chile

Tel: +1 (302) 738 7100

Email: ntucker@pma.com

Web: <http://www.pmafruittrade.com/>

Profile: PMA (Produce Marketing Association) 2015 is expected to attract more than 2,000 participants from the entire fruit and vegetable supply chain. The Expo will also include a business roundtable which will provide an opportunity to organise face to face meetings between buyers and sellers.

Further Information:

For more information related to opportunities in other sectors in Chile and for similar reports for other countries in the region, see: <http://www.fas.usda.gov>

Mailing Address:

Office of Agricultural Affairs

FAS/USDA

3460 Santiago Pl.

Washington, D.C.

20521 / 3460

Street Address:

Office of Agricultural Affairs

U.S. Embassy, Santiago

Av. Andres Bello 2800 – Las Condes

Santiago, Chile

Tel.: (56 2) 2330-3704

E-mail: agsantiago@fas.usda.gov

Websites:

<http://www.usdachile.cl> ; Agricultural Attaché's Office in the U.S. Embassy Santiago homepage.

<http://www.fas.usda.gov> ; Foreign Agricultural Service homepage.

Appendix 1: Importers and Retailers

Table 16: Top 20 Importers and Retailers in Chile by Decreasing Value of Imports.

Company Name	Website
Alimentos Agrosuper Ltda	www.agrosuper.com
Walmart Chile Comercial Ltda	www.walmartchile.cl
Cencosud Retail S.A.	www.cencosud.com
Nestlé Chile S.A.	www.nestle.cl
Distribución y Excelencia S.A.	www.desa.cl
Iansagro S.A.	www.iansagro.cl
Marfrig Chile S.A.	www.marfrig.cl
Rendic Hermanos S.A.	www.unimarc.cl
Rabos Servicios y Asesorias Ltda	No website listed
Comercial Cerrillos S.A.	www.comercialcerrillos.cl
ProSud S.A.	www.prosud.cl
Global Protein S.A.	No website listed
AgroCommerce S.A.	www.agrocommerce.cl
Cerveceria Chile S.A.	www.cerveceriachile.cl
Sociedad Comercializadora del Sur Ltda	www.socosur.cl
Importadora Café do Brasil S.A.	www.icb.cl
Cia Molinera San Cristóbal S.A.	www.sancristobal.cl
Empresas Carozzi S.A.	www.carozzi.cl
Prolesur S.A.	www.prolesur.cl
Watt's S.A.	www.watts.cl

Source: Chilean Customs